

**System Coordination Office's**  
**Suggested “Best Management Practices”**

**for**

**Making Presentations to the**  
**National IT Investment Board**

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## **1.0 Purpose**

The System Coordination Office (SCO) WO-570D, has developed a set of “best management practices” (BMP) that provide project managers with guidance for improving overall project management within the Bureau. This guide is part of the project management BMPs that have been developed by the SCO.

This document provides project managers with general procedures for making presentations to the national IT Investment Board (ITIB). These procedures are designed to maximize the efficiency and productivity of ITIB meetings.

Specific procedures for types of presentations, as well as forms and templates for that presentation type, can be found in other BMP’s in this series.

## **2.0 Applicability**

*All* project managers working on national level projects that have been approved, or are seeking approval, by the ITIB, are required to conform to these guidelines.

## **3.0 Management Objective**

Time is very limited at ITIB meetings and the agendas are always full. In order to ensure that all agenda items are given appropriate consideration and to maximize the effective use of the Board members’ time, it is important that presenters follow standard procedures and observe strict time limits.

Presentations to the ITIB must provide meaningful information regarding IT Investments. This information should be in a concise and structured format that addresses project scope, schedule, and budget. These are the three areas that will be used to evaluate the status and success of IT investments as they progress. Presentations should also include the business needs that are driving the project.

## **4.0 Procedures for Presentations**

### **4.1 General**

#### **4.1.1 General Process**

Time limits include the presentation, questions, and a decision from the ITIB. You will be ***strongly*** reminded of the time limits of your presentation.

Presentations may include handouts, slide shows, flip charts, etc. An electronic copy of presentations and handouts shall be provided to the SCO no later than two weeks prior to the meeting to be included in the briefing books. Paper copies of additional handouts may be provided to the Board at the meeting. It is strongly suggested that these handouts be brief and not include drastically changed or new information to that presented to the SCO, as the Board will not have time to review before the meeting.

A laptop computer with a projection monitor will be set up in the meeting room for all presenters to use. The laptop will have both Microsoft PowerPoint and Corel Presentations software. Your slide show should be sent to SCO on removable media (floppy or CD) so that it can be transferred to the laptop at least two weeks prior to the meeting. To minimize setup and tear-down time, presenters are strongly discouraged from using their own laptops for presentations. Exceptions can be made where special software is required for live demos, but please notify your SCO contact well in advance.

Due to limited meeting space and the number of presentations, presenters are requested to attend only those portions of the meeting which include their proposal/project.

Participation in the meetings is limited to the Board members, unless one of the Board members recognizes and requests input from non-ITIB participants.

#### **4.1.2 Information to Include**

Presentations shall address the above-mentioned three critical areas as well as other information required in the following presentation categories:

**Scope:** Clearly define the boundaries of your project - what the project will and will not accomplish. If you are giving a Project Status Update, and scope “creep” has been identified, you will need to describe the rationale for the change in scope, and what actions are needed to incorporate or reject the activity. If you are within your baselined project scope, then say so.

**Schedule:** This is the area in which most projects are challenged. Primarily, the Board is concerned about how the schedule will impact costs and other projects/systems. In some cases, a new or changed schedule may impact other project(s) that depend on delivery of your project; therefore, your schedule may be amended based on extenuating circumstances. Projects should present schedule information based on GAO’s Select, Control, and Evaluate phases and stages - a high-level description of when you plan to begin definition, design, development, testing, deployment, etc..

**Budget:** Budget estimates presented at the Business Case stage, as with scope and schedule, will be used as the baseline for your project. Be advised that any costs above 5 percent of your planned target will be reported to the Department. If you are exceeding 10 percent of your planned costs, OMB will be notified. Therefore, you should pay close attention to your costs, and be advised that audits may follow.

## **4.2 Investment Proposals**

(Time limit: 10 minutes) A decision will be made whether or not to allow the proponent to continue with the development of a business case. In some cases, the Board will direct IP proponents to work with similar on-going or new projects to ensure that parallel efforts are not sanctioned. The SCO staff is willing to make the presentation on your behalf, and the proponent may not necessarily be in attendance.

## **4.3 Business Cases**

(Time limit: 20 Minutes) A decision will be made whether or not to allow the proponent to proceed with the development of acquisition and project plans. We suggest that the presenter be prepared to address the issues identified in the findings/recommendations presented by the SCO. Be brief and focus on the business merits of the project, not the technical or “functional” attributes of the system. Be prepared to answer questions.

## **4.4 Project Updates**

(Time limit: 10 minutes) These presentations must be structured around the scope, schedule, and budget criteria. If you have controversial issues in any of these areas, please advise the SCO prior to the ITIB meeting. Are you declaring that the project is moving from one stage to another? If so, please check the format and requirements needed to document your request, available in Washington Office Instruction Memorandum No. 2001-222, Information Technology Investment Management Process Version 1.0 .

## **4.5 Declaration of Project Status**

If you have an on-going project that has not previously received ITIB approval, it is necessary to inform the Board of your project’s status in order for the Board to make decisions based on the Bureau’s entire IT portfolio picture. State which phase of the process your project is in: Select, Control, or Evaluate.

## **5.0 Roles and Responsibilities**

***System Coordination Office (WO-570) Manager*** - Oversees all projects or efforts being managed as projects that have been approved or are being tracked by the ITIB. The System Coordination Office is responsible for establishing the agenda for ITIB meetings.

***System Coordination Office (WO-570) Deputy*** - Serves as the SCO Manager in his/her absence.

***Project Manager*** - Responsible for preparing and presenting all project status reviews with the Project Sponsor and providing the required information for the ITIB reviews.